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1991 GWAII HAANAS VISITOR SURVEY RESULTS

Presented to the Gwaii Haanas Management Board

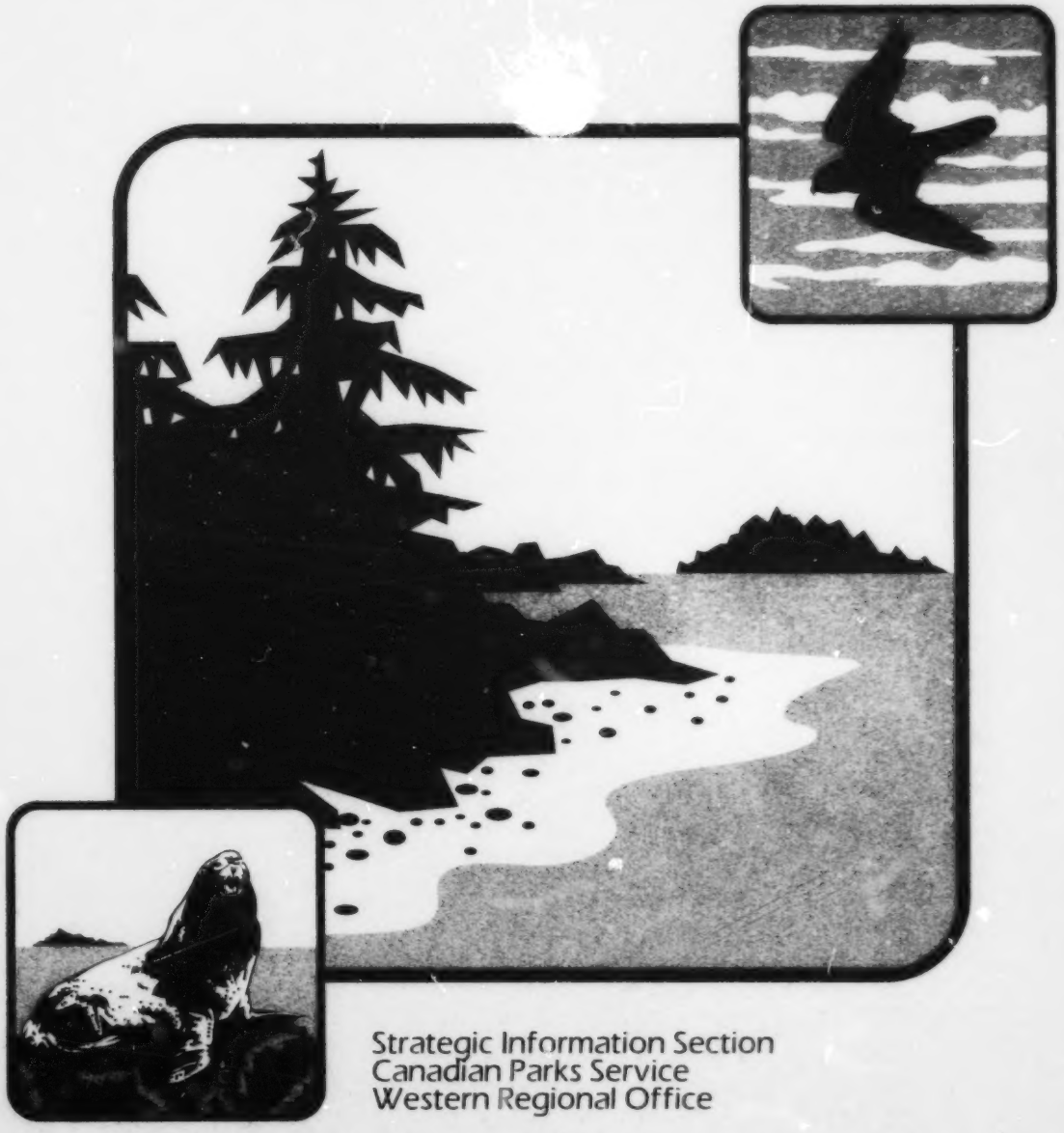

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Table of Contents

1. Introduction 1
   - 1.1 About the Study 1
   - 1.2 Description of Gwaii Haanas 1
   - 1.3 Objectives of the Study 1
   - 1.4 Survey Design 1
   - 1.5 Limitation of the Visitor Survey 2
   - 1.6 Further Information 2

2. Visitor Demographics 2
   - 2.1 Number of Visitors 2
   - 2.2 Primary Destination/First Time Visitor 3
   - 2.3 Visitor Types 3
   - 2.4 Origin of Visitors 3

3. Visitor Trip Information 4
   - 3.1 Travel Into and Around Gwaii Haanas 4
   - 3.2 Length of Stay 4
   - 3.3 Accommodation: Before and After Trip 4
   - 3.4 Information Sources Used Before and During Visit 5

4. Activities 7

5. Detractions from Experiences 8

6. Environmental Knowledge 8

7. Importance and Satisfaction of Facilities and Services 9

1. Introduction

1.1 About the Study:

The Gwaii Haanas Management Board requested that a study of visitors be undertaken to determine visitor satisfaction levels and behaviour patterns. In response to this request, a visitor survey was conducted by the Strategic Information Section of the Canadian Parks Service during the summer of 1991. Prior to this study, little was known about the visitors, their interests or their satisfaction with the services and facilities within Gwaii Haanas. The information collected will be used to develop a management plan which will guide the future development and direction of Gwaii Haanas. The management board is responsible for managing Gwaii Haanas and is made up of representatives from the Canadian Parks Service and the Haida Nation.

1.2 Description of Gwaii Haanas

Gwaii Haanas is located in the southern portion of the Queen Charlotte Islands, 215 km southwest of Prince Rupert on Canada's west coast. It is 640 km north of Vancouver and is a wilderness area comprised of 138 islands that stretch 90 km north and south.

An estimated 1.5 million seabirds nest in the Queen Charlotte Islands from May to August with half of these found in Gwaii Haanas. The sea also holds an abundance of sea life around the islands such as killer whales, humpback whales, minke whales, dolphins and harbour seals. As well, the largest breeding colony of Steller's sea lions, located near Cape St. James, is within the Gwaii Haanas boundary.

This biologically-diverse region is important to the Haida nation. Throughout the islands, there are remains of village sites which are now protected and interpreted by the Haida Gwaii Watchmen. In 1981, UNESCO, in consultation with the Haida nation, declared the village site of Ninstints a World Heritage Site.

Access to Gwaii Haanas is challenging due to the nature of its landform and absence of roads or trails. The only way through Gwaii Haanas is by air or sea, and usually requires a boat trip of two or more days. It is, however, this challenging access and wilderness found upon arrival that is the primary attraction for visitors.

1.3 Objectives of the Study:

The primary goal of the study was to collect visitor information to assist in the development of the management plan. To accomplish this goal, a set of seven survey objectives were identified. All questions on the visitor survey were related to one of the following seven objectives;

a) demographics and number of visitors
b) trip and visit information
c) perceptions on future development
d) visitor satisfaction and importance of facilities
e) expenditure information
f) knowledge of environment-friendly behaviour
g) level of existing facility use

1.4 Survey Design:

During the summer of 1991, visitors' addresses and trip information were collected through a visitor registration system. Visitors were also

asked if they would agree to participate in a visitor survey. As a result over a 1000 questionnaires were mailed out accounting for over 95% of all registered visitors. A response rate of 45% was achieved, indicating that the sample is a highly representative one of the entire population.

To ensure statistical validity and reliability, the survey results were cross examined with the visitor registration system. In terms of the origin of visitors and type of visitor party, the survey is representative of the population. This cross examination confirmed that the sample is highly accurate with a 95% confidence of being within +\- 3% of the true population mean.

The survey was distributed to individuals and therefore the base of analysis is an individual rather than a visitor party.

1.5 Limitations of the Visitor Survey

The scope and limitation of the survey need to be clearly understood to ensure that the results are interpreted correctly. The first limitation of the survey was that the sampling frame included visitor names recorded on the registration system. The registration system is voluntary, and therefore all visitors were not registered. This was particularly true of sport fishermen or individuals travelling in their own vessel who may not have been aware of the registration system. As well, members of the Haida Nation were not likely to have been represented in the survey results.

1.6 Further Information

In addition to the survey results presented in this report, an economic impact study will be conducted in the fall of 1992.

The economic impact study will determine the economic impact of Gwaii Haanas on the economy of the Queen Charlotte Islands, and will be completed by the spring of 1993.

For further information on the 1991 Visitor Survey or other visitor studies, please contact the Canadian Parks Service, Western Regional Office.

2. Visitor Demographics

2.1 Number of Visitors

Prior to conducting the visitor survey, even a basic estimate of the number of visitors was difficult to make given the physical nature of Gwaii Haanas.

Therefore to estimate the number of visitors, visitors and tour operators were requested to register with Gwaii Haanas before leaving on their trip. While there is no way to regulate visitor compliance with the registration system, it is a basis on which to estimate the total number of visitors. Visitor compliance should increase in the future as more visitors and tour operators become aware of the requirement to register with Gwaii Haanas.

The total number of registered visitors entering Gwaii Haanas from May to October 1991 was 1500 persons. This number was comparable to the 1500 visitors' signatures at one of the Haida base camps. Although not all visitors visit the Haida base camps, it is speculated that the estimate of 1500 visitors is within 20% to 30% of the true number of visitors entering the Gwaii Haanas. Once the information centres are constructed, a greater proportion of visitors may register.

2.2 Primary Destination/ First Time Visitors

Gwaii Haanas was the primary trip destination for 88% of all visitors. As well, it was the first time many visitors had been to Gwaii Haanas (87%).

2.3 Visitor Type

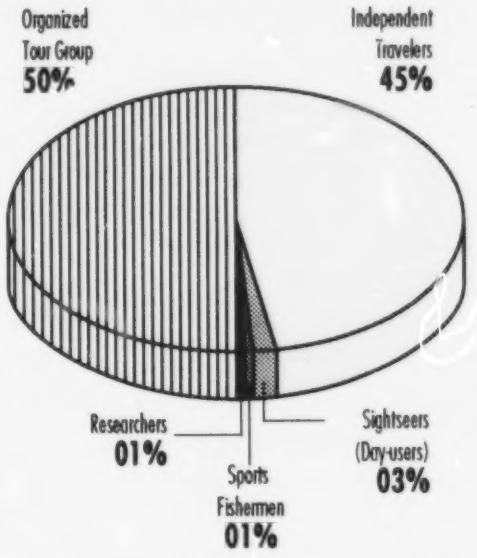
The majority of visitors entered Gwaii Haanas either with an 'organized tour group' or as 'independent travellers'. Figure 1 illustrates the almost equal split between these two groups of visitors. 'Sightseers' are defined as all visitors making a day trip into the park and make up 3% of visitors. It is important to note that the survey did not necessarily capture a representative sample of 'sport fishermen' (see section 1.4 Limitation of Results). For the purpose of this report, 'sightseers', 'researchers', and 'sport fishermen' were considered to be independent travellers.

2.4 Origins

Seventy three percent of all visitors were from Canada with a significant number of visitors from British Columbia. American visitors account for 26% of all visitors while foreign visitors make up roughly 1%.

One interesting difference between Canadian and American visitors was the way that they chose to access Gwaii Haanas. Canadian visitors were more likely to use the services of a tour operator (56%), whereas American visitors (59%) were more likely to travel independently into Gwaii Haanas. All foreign visitors travelled as independents.

Figure 1: Visitor Group Type



3. Visitor Trip Information

3.1 Travel Into and Around Gwaii Haanas

The two most common methods of travelling into and around Gwaii Haanas were 'kayaking' (51%) and 'sailing' (43%). Figure 2 details a further breakdown of this method of travel and reveals a significant difference between tour operators and independent travellers.

Visitors using tour operators were primarily using 'kayaks' (65%), and 'float planes' (73%), while independent visitors were primarily using 'kayaks' (38%) 'sailboats' (48%), and 'power boats'(26%).

3.2 Length of Stay

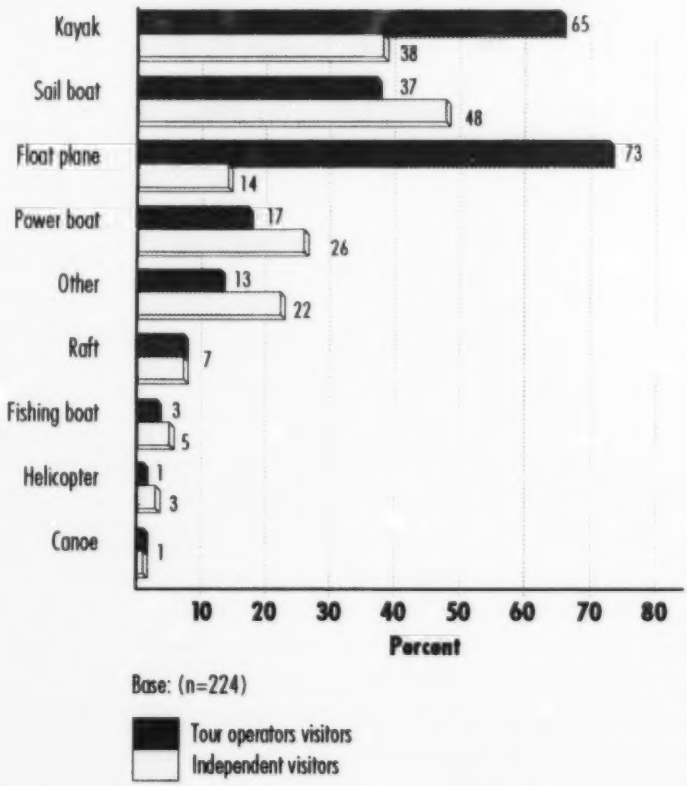
Visitors to Gwaii Haanas tended to be on extended vacations from home with the average being close to 30 days. Of this thirty day vacation, visitors were spending an average of 7.7 nights in the Queen Charlotte Islands and 10.7 nights in Gwaii Haanas. With a total of 18 days spend within the entire Queen Charlotte Islands, visitors were investing a considerable amount of time to explore Gwaii Haanas.

3.3 Accommodation: Before and After Trip

Visitors tend to spend at least one night outside Gwaii Haanas both before and after their visit. Figure 3 compares the accommodation used by independent visitors and visitors with tour operators before and after their visit. Visitors with tour operators tend to stay in more commercialized accommodation such as 'motel/hotels' (18%) and 'bed & breakfast'(49%). In comparison, independent travellers tend to utilize accommodation such as their own boat (30%) or 'campgrounds' (40%).

Only a small change occurred in the type of accommodation visitors used before and after their trip into Gwaii Haanas.

Figure 2: Travel Into and Around Gwaii Haanas

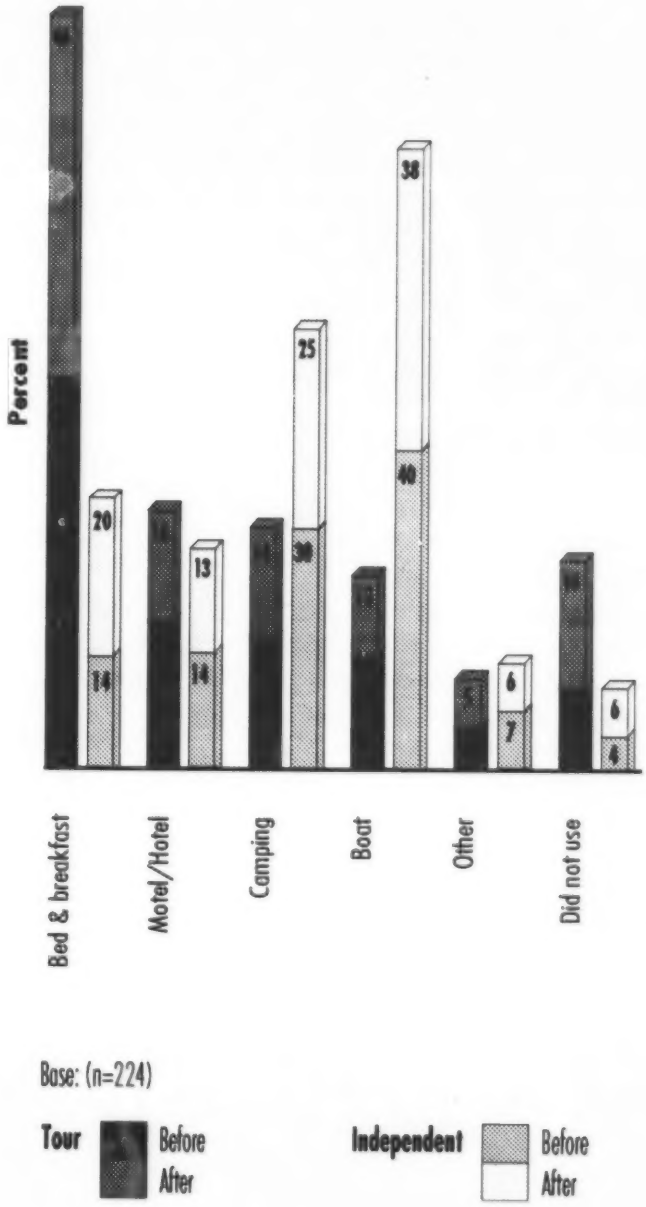


Visitors with tour operators still preferred 'bed & breakfast' (46%) accommodation following their trip and 16% did not use any accommodation after their trip. This may be a reflection of the tour operators schedule and pre-trip arrangements. For independent visitors, there was a tendency to use 'bed & breakfast' (20%) accommodation after their trip as opposed to 'camping' which dropped slightly.

3.4 Information Sources Used Before and During Visit

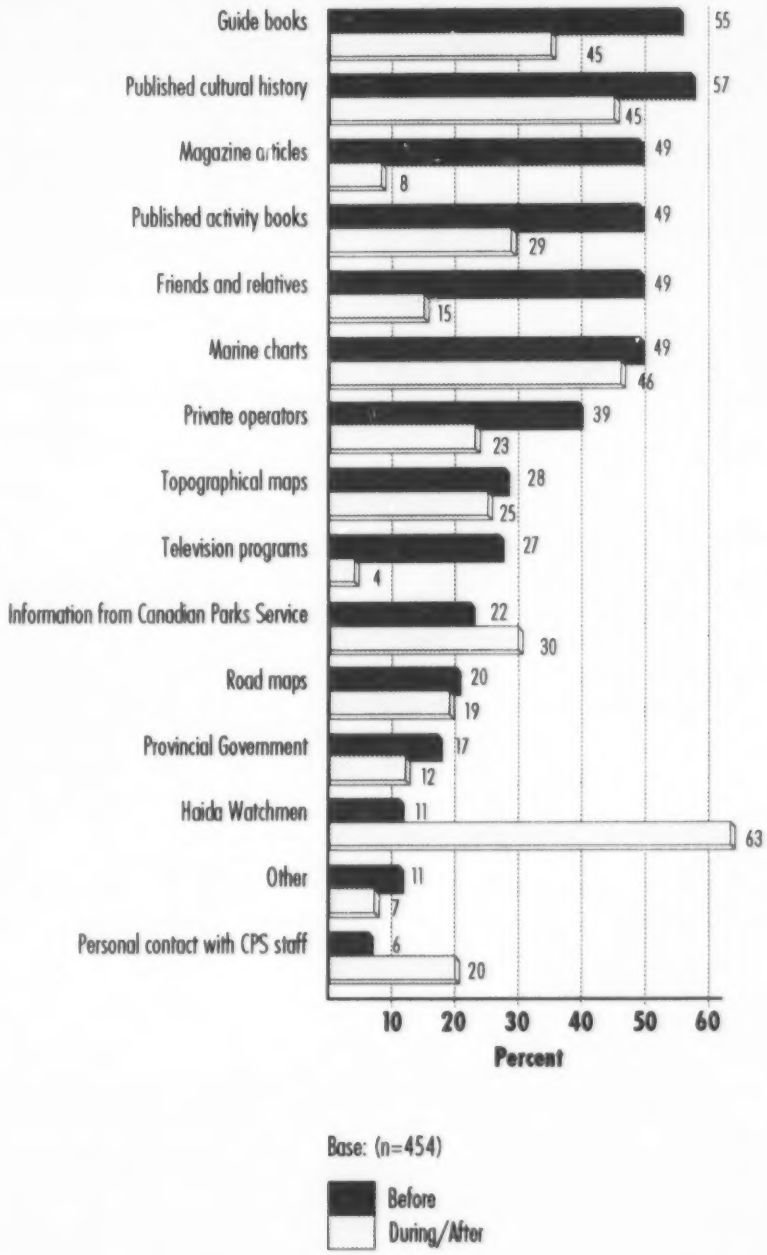
Visitors take advantage of a vast number of information sources to learn about Gwaii Haanas and to plan their visit. Figure 4 highlights the information sources used before and after the visitor's trip. The most frequently used information sources before their visit were books on cultural history (57%, 55% & 49%), friends & relatives (49%), and marine charts (49%). After their trip, visitors were more likely to talk with the Haida Gwaii Watchmen (63%), refer to marine charts (46%) and read cultural history books (45%).

Figure 3: Accommodation Before and After Trip



The relatively small number of visitors obtaining information from the Canadian Parks Service (before visit 22% - during/after visit 30%) may present a communication challenge to the management board. If the management board wishes to influence visitor behaviour and attitudes, or communicate key messages to all visitors, new avenues of communication will need to be explored. Personal contact with Canadian Parks Service staff is also quite small but will likely increase significantly with the construction of the information centres. One suggestion to improve communication with visitors would be to expand the role of the Haida Gwaii Watchmen as they currently make contact with over 60% of all visitors and were the most broadly used source of information.

Figure 4: Information Sources Used Before and During/After Trip

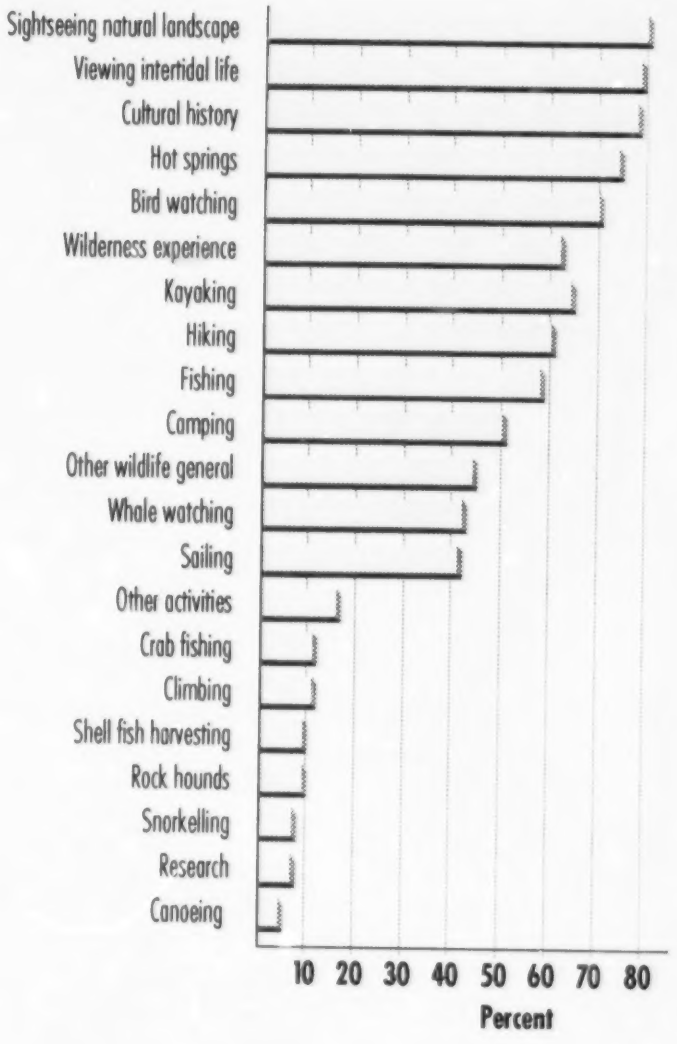


4. Activities

Visitors to Gwaii Haanas can participate in a variety of activities, some requiring highly specialized skills and equipment. Table 5 lists twenty two different activities visitors could have participated in. The most popular activities were those related to sightseeing (80%), cultural history (79%), viewing intertidal life (79%) and the hot spring (74%).

This information on visitor activities is most useful when considered with other variables from the survey. For example, a significant number of visitors were fishing (58%), yet 63% of all visitors either 'did not know' or had the wrong response to the question relating to salmon catch and release. Another example would be the significant number of visitors hiking (60%), yet the majority of visitors do not feel long hiking trails are important. Further analysis of specific activities with other topics may well provide useful information for the management of Gwaii Haanas.

Figure 5: Activities Participated In



5. Detractions from Experience

In order to determine the visitor's level of dissatisfaction with certain intrusions, visitors were asked which events or situations detracted from their experience. Table 1 lists the mean scores, on a scale of 1 to 5, for each detraction. There were only two detractions that significantly affect visitors' experiences, 'garbage from the commercial fishing boats' (3.5) and the 'old, clear cut forests' (4.1). While these two detractions can not be solved in the short term, the management board could prepare visitors for these visual detractions and inform visitors of what action is being taken.

Although the remaining detractions were considered minor by the majority of visitors, these detractions should be monitored to ensure they do not degenerate into major detractions. A future visitor survey will determine if these detractions have improved.

Table 1: Detractions from Experience

Types of Distractions	Mean Score from 1 to 5
Old clear cut forests	4.1
Garbage from commercial fishing boats	3.5
Garbage from other visitors	3.3
Noise from power boats	2.9
Noise from other visitors	2.7
Noise from airplanes/helicopter	2.7
Number of persons at base camps	2.6
Number of persons within each party	2.5
Visibility of other visitors	2.4
Other groups encountered	2.4
Noise from commercial fishing boats	2.4
Presence of tour operators	2.4

Base (n=454)
1 = Minor distraction
5 = Major distraction

6. Environmental Knowledge

Visitors are encouraged to practice and learn about environmentally friendly behaviour while travelling within Gwaii Haanas. This encouragement and education is done through Gwaii Haanas publications, and discussions with staff, the Haida Watchmen, and private tour operators.

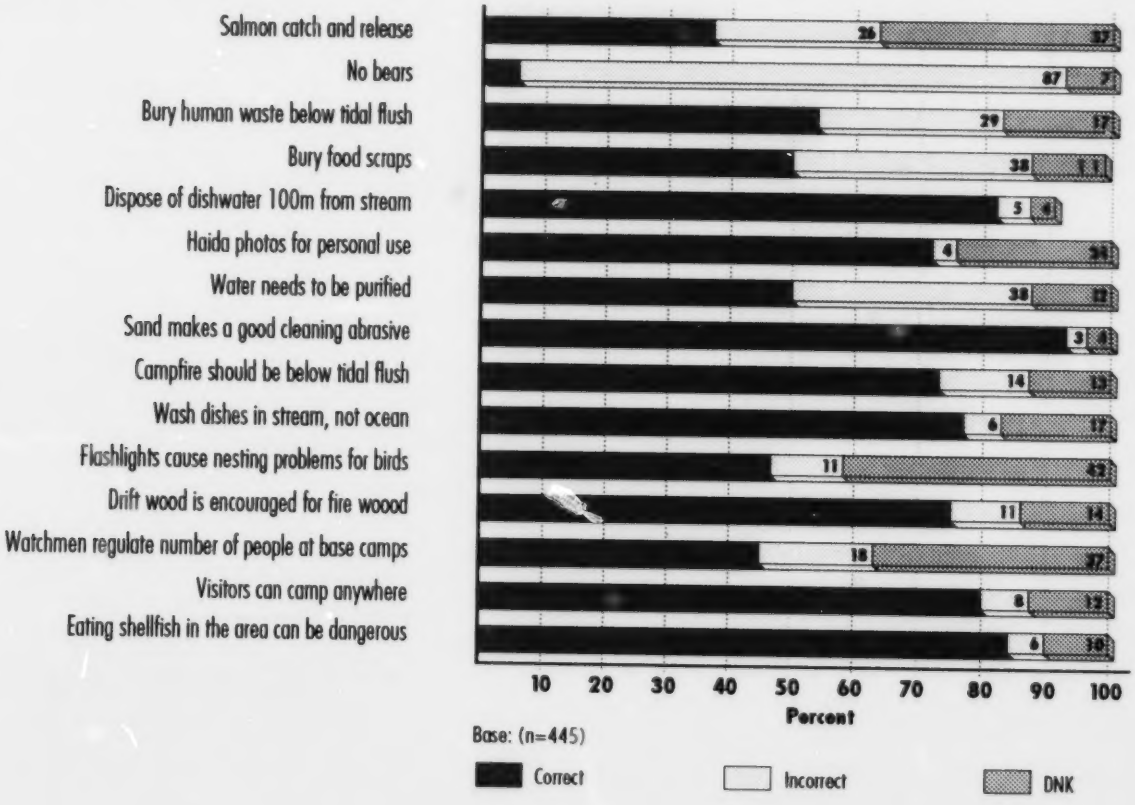
The visitor survey attempted to assess the visitors' current knowledge concerning environmentally friendly practices by asking a series of true and false questions. Although appropriate knowledge does not always guarantee appropriate behaviour, it is the starting point from which environmentally friendly decisions are made.

Figure 6 illustrates the results of the true and false questions related to environmentally friendly practices. Generally visitors identified the correct responses. However, there are a few areas where visitors may need more information. Only 50% of all visitors identified the need to purify drinking water.

Visitors were also not aware of the problems that flashlights pose to nesting birds as 42% 'did not know'. Sixty two percent of all respondants either 'did not know' or incorrectly identified that visitors are encouraged not to practice 'catch and release' of salmon due to their poor survival rate. And finally, half the visitors were not aware that

burying human waste below the tidal flush was an appropriate behaviour. The management board may choose to concentrate on improving the visitors' knowledge in these specific areas, thus maintaining their ecological integrity.

Figure 6: Environmental Knowledge


Salmon catch and release
No bears
Bury human waste below tidal flush
Bury food scraps
Dispose of dishwater 100m from stream
Haida photos for personal use
Water needs to be purified
Sand makes a good cleaning abrasive
Campfire should be below tidal flush
Wash dishes in stream, not ocean
Flashlights cause nesting problems for birds
Drift wood is encouraged for fire woood
Watchmen regulate number of people at base camps
Visitors can camp anywhere
Eating shellfish in the area can be dangerous
10 20 30 40 50 60 70 80 90 100
Percent
Base: (n=445)
Correct
Incorrect
DNK

7. Importance of and Satisfaction with Facilities and Services

One analytical technique used in visitor research to set priorities is called importance/satisfaction analysis. This analysis involves asking visitors to rank the importance of and satisfaction with facilities and services. A comparison between the importance rating and satisfaction rating will indicate which facilities or services need improvement. Since there are few physical facilities at Gwaii Haanas, the importance scores alone will assist in determining which facilities to offer. Those facilities and services which receive a high importance rating and/or a corresponding low satisfaction rating shouldreceive priority from a visitor perspective.

Table 2 lists the importance scores and satisfaction scores for facilities and services that are either being considered or that exist in Gwaii Haanas. The mean score was determined from a 1 to 5 point scale where 1 was 'not very important/satisfied' and 5 was 'very important/satisfied'. Those facilities and services that received a higher importance score compared to the satisfaction score were all related to information services. This suggests that Gwaii Haanas could improve its information services across a host of subjects such as weather, safety, wildlife, environmentally friendly practices and cultural information. It should be remembered that only 30% of all visitors were receiving information from Gwaii Haanas, and that these rating scores could be a reflection of visitors contacting other agencies.

In terms of tour operators most visitors are pleased and satisfied with the quality of their tours. As for specifc facilities and services at the base camps, visitors were less interested in 'tent pads', 'overnight trails', 'outhouses' and the 'availability of fuel depots'. There was some interest in 'short walking trails' around the base camps (3.4 mean) and mixed importance placed on 'moorage buoys' (3.1 mean). Further analysis of the importance and satisfaction scores could provide additional information useful for determining the future development of Gwaii Haanas.

Table 2: Importance and Satisfaction Analysis

Types of Distractions	Importance	Satisfaction	Imp > Sat.
Information from Haida Watchmen	4.5	4.3	*
Information on minimal environmental impact	4.3	3.2	*
Cultural history at base camp	4.2	3.7	*
Information on radio channels	—	3.4	
Weather information	4.1	3.4	*
Tour operator's knowledge	4.1	4.6	
Information on wildlife	4.0	3.5	*
Quality of tour operation	3.8	4.4	
Availability of drinking water	3.7	—	
Hot Springs facilities	3.7	4.2	
Short trails at base camps	3.3	—	
Safety information from park	3.3	3.5	
Outhouse at base camp	3.2	3.6	
Overnight trails	2.8	—	
Established walkways at base camps	2.7	—	
Availablity of fuel depots	2.2	—	
Tent pads / platforms	1.9	—	

* Indicates where the importance score is greater than the satisfaction score signalling an area for improvement.

— Indicates the question was not asked. Either it is assumed to be imporant such as 'information on radio channels' or the facility does not exist such as 'tent / pads'.